

## UNIVERSITY BUDGET OFFICER SERIES

Code No.	Class Title	Occ. Area	Work Area	Prob. Period	Effective Date
4733(2793)	Assistant University Budget Officer	03	355	6 mo.	03/01/90
4728(2793)	University Budget Officer	03	355	6 mo.	03/01/90

Promotional Line: 271

### Series Narrative

Employees in this series are responsible for administering the functions and operations of a university budget office (such as securing state appropriations, projecting operating costs and expenditures, and reviewing and adjusting budget accounts).

### DESCRIPTIONS OF LEVELS OF WORK

#### **Level I: Assistant University Budget Officer**

**4733(2793)**

Employees at this level manage a major component of the budget office and work under administrative direction from the university budget officer.

An Assistant University Budget Officer typically--

1. coordinates the planning, development, and execution of programs, projects, procedures, and reports of the unit responsible for
2. directs and conducts studies and investigations of problems affecting operations of the unit; recommends actions or alternatives to be taken by management to resolve the problems
3. performs liaison work for the unit with others in the institution; confers with other units on the development, interpretation, and installation of budget programs and procedures; interprets policies
4. has full managerial responsibility for the staffing, training and development, performance evaluation, and goal-setting of personnel in the unit
5. may assist in the compilation of university budget document(s) and internal/external reporting requirements
6. implements policies, programs, and procedures within the unit through subordinate staff
7. functions as university budget officer during absences
8. may assist in the administration of entire budget office as designated by the university budget officer
9. performs related duties as assigned

**Level II: University Budget Officer**

**4728(2793)**

Employees at this level direct all the functions and operations of a university budget office and serve as a university's chief representative in budgetary matters. They work under administrative review of the university's executive officer(s).

A University Budget Officer typically--

1. provides various financial information to the university's executive officer(s) and their staff in a variety of differing formats; participates in university budget meetings, acting as chief resource to executive officer(s) and staff regarding financial matters
2. directs the compilation of official university budget document(s)
3. coordinates the preparation of reporting and back-up materials required by internal and external agencies in formats specified by each
4. acts as campus authority on budget questions from outside agencies, governmental bodies, and internal departments
5. projects probable revenues in lieu of revenue requested
6. coordinates the preparation of materials for and responds to both internal and external auditors
7. directs staff involved in university budget operations
8. performs related duties as assigned

**MINIMUM ACCEPTABLE QUALIFICATIONS REQUIRED FOR ENTRY INTO**

**Level I: Assistant University Budget Officer**

**4733(2793)**

**CREDENTIALS TO BE VERIFIED BY PLACEMENT OFFICER**

1. any one or any combination of the following types of preparation:
  - (a) credit for college course work leading to a major in accounting, business administration, or closely related fields
  - (b) progressively more responsible experience that provided a knowledge of generally accepted principles, theories, and practices used in one of the above fields and that was of such scope, level, and quality as to assure the applicant's ability to undertake professional work in the field. The experience must be evaluated on the basis of its comparability to a normal curriculum in the academic areas listed above, taking into account the relationship of the experience to the content of the courses in the curriculum.\*

that totals 1.0 unit according to the following conversion rates: \*\*

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120 semester hours (or Bachelor's degree) in "a" = 1.0 unit

3 years of "b" = 1.0 unit.

2. any one or any combination of the following types of additional preparation:

- (a) credit for graduate level college training with a major emphasis in accounting, business administration, or closely related fields
- (b) professional experience in accounting, budgeting, or fiscal administration

that totals 1.0 unit according to the following conversion rates:\*\*

30 semester hours (or Master's degree) in "a" = 1.0 unit

9 months of "b" = 1.0 unit.

3. in addition to the training/experience listed in 1 and 2, three years of professional experience in a supervisory or managerial capacity in the fields of accounting, budgeting, or fiscal administration that provided a knowledge of the methods, plans, and practices of state/governmental accounting and a knowledge of modern computerized recordkeeping

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\* In substituting experience for education as provided above, it is recommended that, in order to ensure consistent application of these qualifications, the evaluation and verification of an applicant's experience be accomplished through the cooperative efforts of the personnel office and an experienced professional in the appropriate field in a manner that will preserve the applicant's anonymity.

\*\* Amounts of training or experience less than those listed above should be converted to decimal equivalents of 1.0 unit and added together when computing combinations of the different types of preparation.

PERSONAL ATTRIBUTES NEEDED TO UNDERTAKE JOB

1. thorough knowledge of general accounting principles and practices
2. knowledge of (or ability to learn) governing board, university or departmental policies, rules, and regulations affecting budget operations or related areas
3. ability to manage assigned activities, including the direction of personnel and coordination of programs
4. ability to communicate ideas, instructions, procedures, etc. effectively to persons throughout the university or in outside agencies

**Level II: University Budget Officer**

**4728(2793)**

CREDENTIALS TO BE VERIFIED BY PLACEMENT OFFICER

1. possession of training/experience requirements listed for the Assistant University Budget Officer
2. two additional years of professional experience in a supervisory or managerial capacity in the fields of accounting, budgeting, or fiscal administration that provided a knowledge of the methods, plans, and practices of state/governmental accounting and a knowledge of modern computerized recordkeeping (for a total of five such years of supervisory/managerial experience)

PERSONAL ATTRIBUTES NEEDED TO UNDERTAKE JOB

1. extensive knowledge of general accounting principles and practices
2. ability to acquire and retain information (such as policies, procedures, and other such guidelines)
3. ability to apply requirements of state finance acts, governing board regulations, and university records and statistics
4. ability to communicate effectively with many types of persons, including computer personnel, state legislators, university administrators, etc.
5. effective decision-making abilities
6. willingness and ability to remain abreast of changes in accounting policies and procedures, including computer applications

Assistant University Budget Officer  
University Budget Officer

(NEW)  
(REVISED)